

## Paying Copyright Fees (for overages of the 5-in-5 rule)

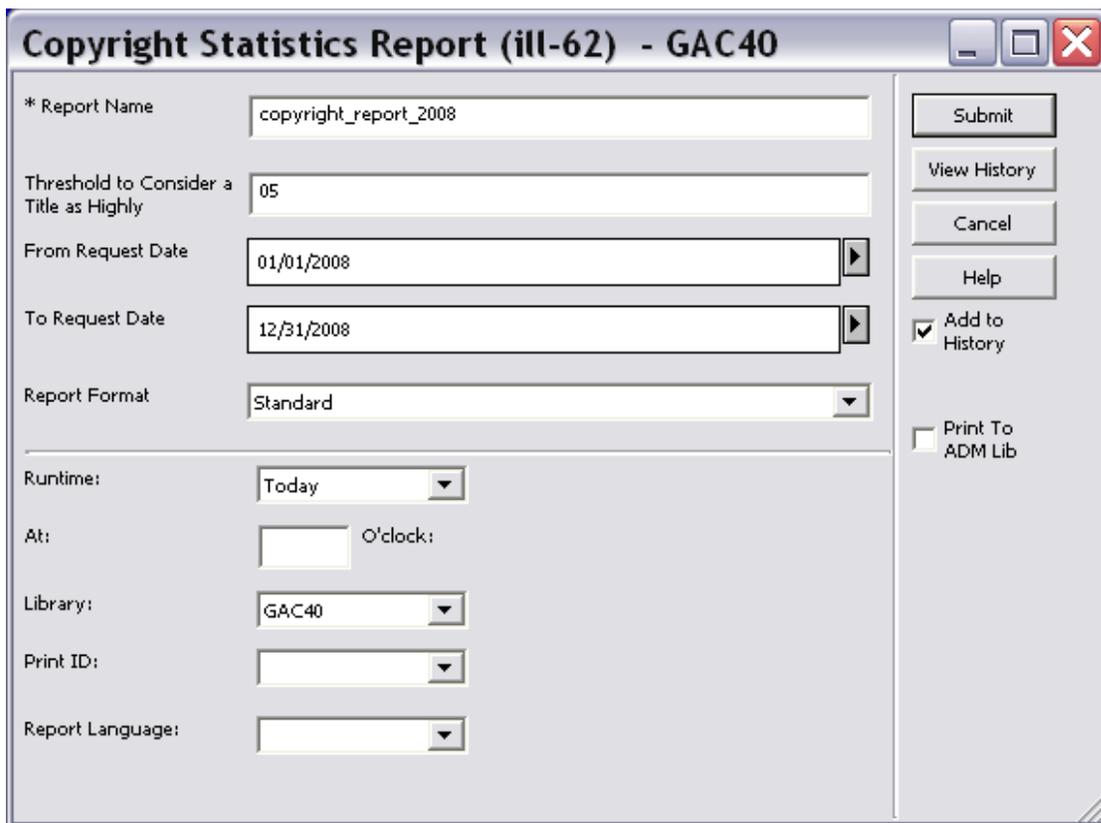
Each calendar year (January-December), when requesting articles, we are guided by the 5-in-5 “rule” - 5 article requests from the last 5 years from the same journal. We need to investigate paying copyright fees on additional articles.

Several times throughout the year, a Copyright Statistics Report (ill-62) can be run to track the journals that have or are approaching our limit of 5.

Fees are paid in early January for the previous calendar year. We use our online account at the Copyright Clearance Center to report and pay our expenses.

### PART 1: RUNNING THE REPORTS

1. In the Aleph ILL module, run the Copyright Statistics Report (ill-62) using the example below to establish parameters.



The screenshot shows a dialog box titled "Copyright Statistics Report (ill-62) - GAC40". The dialog box contains several input fields and buttons. The fields are: "\* Report Name" (text box with "copyright\_report\_2008"), "Threshold to Consider a Title as Highly" (text box with "05"), "From Request Date" (calendar picker with "01/01/2008"), "To Request Date" (calendar picker with "12/31/2008"), "Report Format" (dropdown menu with "Standard"), "Runtime:" (dropdown menu with "Today"), "At:" (text box with "0'clock"), "Library:" (dropdown menu with "GAC40"), "Print ID:" (dropdown menu), and "Report Language:" (dropdown menu). On the right side, there are buttons for "Submit", "View History", "Cancel", and "Help". There are also two checkboxes: "Add to History" (checked) and "Print To ADM Lib" (unchecked).

2. Pull up the completed report in the Task Manager and print it. (Alternately, export the report to Excel and save as a worksheet).

3. For each journal on the resulting report, search for requests in the ILL module using the ISSN listed.
4. In the resulting list, highlight the first request that falls within the appropriate date.
5. Click on the **Copyright** button.

The screenshot shows the ALEPH ILL software interface. At the top, the title bar reads "ALEPH ILL - Version 19.01 Library: GAC40 - GAC ILL (GAC40) Server: aleph.mnpals.net:10727 (19.01) User: ...". The main window is divided into several sections:

- Search Section:** The "ISSN" field contains "ISSN: 0197-1508" and the "Words from Title" field is empty.
- Request List:** A table titled "List of Requests" displays the following data:
 

Title	Request No.	Status	Last Activit' Msg	Rush
Neurobiology of Aging.	125841	Closed	05/18/09	Normal (Full)
Neurobiology of Aging.	65722	Closed	12/02/08	Normal (Full)
Neurobiology of Aging.	65704	Closed	11/26/08	Normal (Full)
Neurobiology of Aging.	61557	Closed	11/17/08	Normal (Full)
Neurobiology of Aging.	61556	Closed	11/17/08	Normal (Full)
Neurobiology of Aging.	61555	Closed	11/17/08	Normal (Full)
Neurobiology of Aging.	61554	Closed	11/17/08	Normal (Full)
Neurobiology of Aging.	61540	Closed	11/14/08	Normal (Full)
Neurobiology of Aging.	55912	Closed	10/30/08	Normal (Full)
Neurobiology of Aging.	55911	Closed	10/30/08	Normal (Full)
Neurobiology of Aging.	50086	Closed	10/14/08	Normal (Full)
Neurobiology of Aging.	28491	Closed	04/29/08	When
- Request Details:** The "Suppliers" tab is active, showing a table with one entry:
 

Line #	Partner Code	Partner Name	Av. St	Status
01	IMNU	University of Minnesota TWIN CITIES (MINU)	5	Closed

Annotations on the right side of the screenshot indicate the steps: "2. Search for requested articles using the ISSN.", "3. Highlight the request.", and "4. Click Copyright." The "Copyright" button is located at the bottom right of the request list table.

2. Search for requested articles using the ISSN.

3. Highlight the request.

4. Click Copyright.

6. In the Copyright Management pop-up window, make note of the **Filled Requests** that exceeded our 5-in-5 limit.

**Copyright Management**

**Copyright Information**

Title Neurobiology of Aging.  
ISSN/ISBN 0197-4580  
Year 2005  
Copyright Status 20-Above max of free copies

**Current Copyright Summary**

Filled Requests 9 - Req. No: 65722 61557 61556 61555 61554 55912 55911 50086 28491  
Outstanding Requests 0

Update Copyright Status

Change Copyright Status to 20-Above max of free copies Recalculate

Note

Copyright Payment

Approval Number

Payment Status Not Handled

OK

Cancel

Help

*For example:*

The Copyright Statistics Report indicated we filled 9 requests for this journal title in 2008.

We need to pay fees for the most recent 4.

7. Using the [Copyright Fees Information Ledger form](#) to record the information is helpful; alternately, you can import the original report to Microsoft Excel and make notes there.
8. Using the request numbers, pull up each request and make note of the publication year and total number of pages. If a specific article was requested more than once, also make note of the number of copies.
9. Do this for each journal title. Occasionally, some ILLs appear that we don't need to pay for or have already paid for. Some adjustments need to be made every year. Examples include duplicate requests, items freely available online, etc.

## **PART 2: PAYING THE FEES**

10. When you have all the information, go online to the Copyright Clearance Center website and log in: <http://www.copyright.com/>
11. Click on the **Get Permissions** link.
12. In the **Publication Title or ISBN/ISSN** field, enter the ISSN of the journal, then click **Go**.
13. Click on the **Pay-Per-Use Options** button, then choose **Report Interlibrary Loan (ILL) borrowing** under **Deliver via Interlibrary Loan (ILL) or document delivery** section.
14. Click **Price & Order** button.

15. You'll see a screen like this:

The screenshot shows the Copyright Clearance Center (CCC) website interface. At the top, there is a navigation bar with the CCC logo and user information: "Welcome, Barbara" with a "Not you?" link, and links for "Log out", "Cart (0)", "Manage Account", "Feedback", "Help", and "Live Help". Below the navigation bar are tabs for "GET PERMISSION", "LICENSE YOUR CONTENT", "PRODUCTS AND SOLUTIONS", "PARTNERS", "EDUCATION", and "ABOUT US". A search bar labeled "Get Permission / Find Title" contains the ISSN "0305-0483" and a "Go" button. Below the search bar is a link for "Advanced Search Options".

The main content area is titled "Price and Order" and includes a link to "Start new search". It displays the following information:

- Omega** (with links for "Live Help" and "Tutorial")
- ISSN:** 0305-0483
- Author/Editor:** LEV, B
- Publication type:** Journal
- Publisher:** PERGAMON
- Rightsholder:** ELSEVIER SCIENCE & TECHNOLOGY JOURNALS
- Language:** English
- Country of publication:** United Kingdom of Great Britain and Northern Ireland
- Per Copy Fee:** \$ 36.00

Below this information, the "Permission type selected" is "Deliver via Interlibrary Loan (ILL) or document delivery" and the "Type of use selected" is "Report Interlibrary Loan (ILL) borrowing". There is a link to "Select different permission".

The "Total Price" is \$ 0.00. A form section with a "\* Required" label contains three input fields:

- Publication year of title being used: \*
- Total number of pages: \* More...
- Number of copies: \*

An "Update Price" button is located to the right of these fields. Below this is the "Additional details: (Optional)" section with two input fields:

- Article/Chapter:
- Your reference: (Example: prosmith456-1, prosmith456-2)

The "Total Price" for this section is also \$ 0.00. At the bottom right, there is an "Add to Cart" button.

16. Fill in the Fields with the information you collected from each request, then click **Update Price** and **Add to Cart**. Once the item is in your cart, you'll see individual prices and a running total.
17. At the top of the page, in the **Get Permission/Find Title** field, you can search again.
18. When your search is complete, click on **Check Out** and complete the payment information to pay by credit card.
19. Print a copy of the itemized invoice – the library administrative assistant should also get a copy. Remember to log out of the CCC account when finished.

### PART 3: UPDATING THE ALEPH RECORDS

After the fees have been paid, we need to go back into the Aleph ILL module and mark each request.

20. Using either the ISSN or the individual request numbers, find the requests for which we just paid copyright fees.
  - a. With the request highlighted, click on the **Copyright** button.
  - b. In the **Copyright** Management pop-up window, under the **Copyright Payment** section:
    - i. In the **Approval Number** field, type in the calendar year (YYYY).
    - ii. Choose **Paid** from the **Payment Status** drop down menu.
  - c. Then click **OK**.
  - d. For those requests for which we decided NOT to pay fees, the **Payment Status** can be changed to **Dismissed**. No Approval Number is necessary.

The screenshot shows the 'Copyright Management' dialog box. It has a title bar with standard window controls and an 'OK' button. The main content area is divided into several sections:

- Copyright Information:** A table with the following data:

Title	Journal of adolescent health.
ISSN/ISBN	1054-139X
Year	2006
Copyright Status	20-Above max of free copies
- Current Copyright Summary:** A table with the following data:

Filled Requests	1 - Req. No:66773
Outstanding Requests	0
- Update Copyright Status:** A section with a 'Change Copyright Status to' dropdown menu (currently showing '20-Above max of free copies'), a 'Recalculate' button, and a 'Note' text area.
- Copyright Payment:** A section with an 'Approval Number' text field (containing '2008') and a 'Payment Status' dropdown menu (currently showing 'Paid').

Annotations on the right side of the dialog box:

- A blue box with the text "Approval number" goes here (YYYY)." has a blue arrow pointing to the 'Approval Number' text field.
- A blue box with the text "Choose Paid." has a blue arrow pointing to the 'Payment Status' dropdown menu.

Buttons on the right side of the dialog box include 'OK', 'Cancel', and 'Help'.

21. If desired, a Copyright Payment Report (ill-61) can then be run and filed. This report will include the ISSNs, journal titles and specific request numbers for paid articles. Run the report using the example below.

The image shows a software dialog box titled "Copyright Payment Report (ill-61) - GAC40". The dialog contains several input fields and controls:

- \* Report Name:** A text field containing "copyright\_paid-2008".
- Update Database:** Radio buttons for "Yes" and "No", with "No" selected.
- Retrieve by Approval Number:** Radio buttons for "Yes" and "No", with "Yes" selected.
- Approval Number:** A text field containing "2008".
- Change Copyright Payment Status to:** A dropdown menu.
- Report Format:** A dropdown menu set to "Standard".
- Runtime:** A dropdown menu set to "Today".
- At:** A time selection field with "O'clock:" next to it.
- Library:** A dropdown menu set to "GAC40".
- Print ID:** A dropdown menu.
- Report Language:** A dropdown menu.

On the right side of the dialog, there are several buttons and checkboxes:

- Submit** button
- View History** button
- Cancel** button
- Help** button
- Add to History**
- Print To ADM Lib**

